View and Run Reports

Depending on the role assigned to you in dash, you may be able to view and run various reports.

For a list of the reports that each role may view, print and export, refer to Page 4 of this guide.

			dash	≡ ⊦	łome		
			Listings	The I	Daily dash		
1. Click Business		15	Transactions	Run	a Report 🗲 2		
Intelligence on the left navigation menu.			People	My R	eport Subscriptions		
2. Click Run a Report.		X	Brokerage	BUSIN	ESS PLANNING & FORECASTING		
		\$ →	Franchise Billing	Busir	ness Plan List		
	1 —		Business Intelligence	Crea	te a New Plan		
		Ø	ePay	Busir	ness Plan User Guide		
The Reports screen	REPORTS 😡						
displays.	All Recent F	Reports Mo	ost Viewed My Subscriptions	Reports User (Suide		
3. Click the tabs at the top	► Alerts				(i) Click on a title to see the respective report.		
to view:	 Listing Repo Brokerage R 						
 All reports available to 	People Repo						
you - Decent Deports that		anagement Repo					
 Recent Reports that you have run 	Awards Rep	orts					
 Reports that you have 	Miscellaneo	us Reports					
viewed most often							
 Reports that you have subscribed to 							
• A user guide that walks							
you through running							
and viewing reports							

	REPORTS O	
 4. Click the arrow next to a report section to expand it. In this example, we will open the Alerts section. 	All Recent Reports Most Viewed My Subscriptions Reports Use Alerts Listing Reports Brokerage Reports	ser Guide (1) Click on a title to see the respective report. For more details, click on the report.
	REPORTS O	
 A list of reports available in the section displays. 5. Click the report you would like to run. In this example, we will click Listing Alert. 	All Recent Reports Most Viewed My Subscriptions Reports U Alerts Listing Alert People Alert Brokerage Alert Transaction Alert	ser Guide
The description of the new ort	REPORTS O	
The description of the report displays on the right.	All Recent Reports Most Viewed My Subscriptions Reports User Gu	lide
	V Alerts	Listing Alert
6. Click Go .	Listing Alert People Alert Brokerage Alert Transaction Alert	The Listing Alert report contains listing details for any active listing alerts within the office(s) selected.

7. Select the **Export Type** for your report (Excel or PDF)

Note: Some reports may only be available in one format.

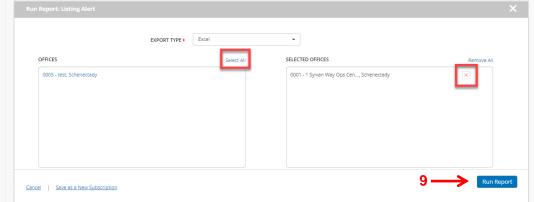
	EXPORT TYPE *	PDF	-	
OFFICES			ED OFFICES	Remove All
0001 - 1 Sylvan Way Ops Cen, Schenectad	y	PDF	~	
0005 - test, Schenectady		Excel		

The office selection window displays.

8. Click an office on the left to include the office in the report, or click **Select All** to include all offices.

> To remove an office from the report, click **X** next to the office name on the right.

9. Click Run Report.



Business Intelligence

All | Recent Reports | Most Vi

REPORTS 0

Alerts
 Listing Alert

People Alert Brokerage Alert

Transaction Alert

Listing Reports
 Brokerage Reports
 People Reports
 Business Managem
 Awards Reports
 Miscellaneous Repo
 Monthly Billing State

- 10

dash

Listings

People People

 S→
 Franchise Billing

 Business Intellip

Listing Alert (1).pdf

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10. Click on the report to open it.

The chart below shows the various reports that the different roles in dash may view, print and export.

Please note that some reports may not apply to your brand.

			ert			Listing Brok Reports Rep									-					Peopl		Business Management Reports										A		Misc.				
		Rep	orts			Re	epor	ts					Re	epor	ts				R	epor	IS				Re	por	ts					Re	por	ts		R	epor	S
Reports	Listing Alerts	People Alerts	Transaction Alerts	Brokerage Alerts	Special Program Status Report	Listing Inventory Report	Special Programs Listings Report	Open House Report	Commercial Listing Percentage	Closed Business Journal	Area Served Report	Agent Anniversary Report	Recuiting and Termination Report	Consumer Mailing List Report	Office Detail Report	Sales Representative Performace Report	Broker Pending Report	Lease, Property Management, and Rental Report	Staff Roster Report	Sales Associate Production Detail Report	Sales Associate Production Summary Report	Business Analysis Report	Office Production by Sales Associate Report	Production Summary Report	Sales and List Price Analysis Report	Sales Mix Report	Trend R eport	Business Drivers Report	Leading Indicators Report	Operational Efficiency Report	Award Eligibility Report - Company/Office Level	CO95 - Producer Awards Summary Report	CO98 - Top 21 Ranking Summary Report	Preliminary Designation Report	Agent Pacing Report	Daily Activity Report	Data Import Status Report	User Permission Report
Roles																																						
Brokerage Admin	х	x	x	x	х	x	x	x	x	x	x	х	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	х	x	x	x	x
Office Manager	х	x	x	x	х	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	х	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Company Data Entry																																						
Finance Management																x																						
Transaction Coordinator			x							x				x	x		X	x																				
Listing Coordinator	x				х	x	x	x	x					x																								
Listing Data Entry	x				x	x	x	x	x																													
Resource Mgr w/Security Admin		x										x	x						x																			x
Resource Mgr		x										x	x						x																			
Sales Agent	x				x	x	x	x																														
Sales Agent (read only)	x				x	x	x	x																														
Read Only	x	x	x		х	x	x	x	x										x																			